

CASE STUDY

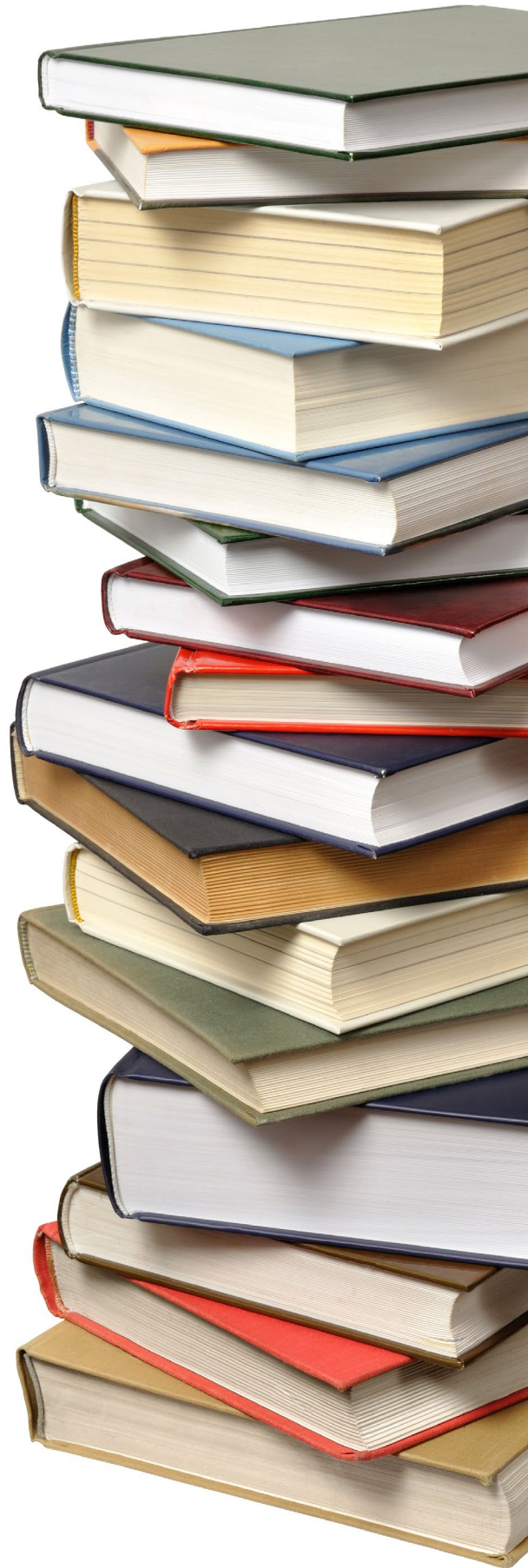
McGill University Gives Intellera an A+ in Workflow Automation

Like many other institutions of higher learning, McGill University counts on philanthropic support in the form of donations and endowments from alumnae and other interested parties. The Fundraising process can be very time consuming and involves many managers, employees and external stakeholders. The Customer Relationship Management (CRM) system plays an integral role in all the university's fundraising communications. A project to replace and update the CRM had been on the list of projects to do but had been stalled. An important aspect of the project was workflow automation so a decision was made to find a solution that could automate manual processes and integrate with the existing CRM system.

With our new workflow, what used to take weeks, now takes days

Joanne Morris,

Portfolio Manager at McGill University's Advancement Office





The customer

McGill University is one of Canada's best-known institutions of higher learning and one of the leading universities in the world. With students coming to McGill from over 150 countries, the student body is the most internationally diverse of any research-intensive university in the country. In addition to a stellar faculty, McGill is known for attracting the brightest students from across Canada, the United States, and around the world.

University Advancement is the department responsible for alumni engagement and services, fundraising for University priorities, communications that support alumni and development programs, and donor relations.

The challenge

Although the Advancement office had access to an in-house IT department with developers capable of developing a solution to automate workflows, they knew the project would take a long time to deliver. The Advancement team needed to find a solution that would speed up the process. They had identified a few critical business processes that needed to be automated including the solicitation approval, the Memorandum of Agreement, the Planned Gift Request and the Signatures for Memorandum.

These three business processes were very labour-intensive, time-consuming and paper based. Multiple signatures were required and bottlenecks along the approval process often slowed things down considerably. Lack of visibility made it difficult to identify where these bottlenecks were in the system. Requests for approval would sometimes sit in email inboxes for days.

The solution

After researching the offerings on the market, they quickly determined that WorkflowGen was clearly the best choice. WorkflowGen requires little or no code so it can automate any manual process quickly and allowed workflows to be customized and integrated to fit particular requirements. Joanne Morris, Portfolio Manager at McGill University's Advancement Office was leading the project and chose Intellera as McGill's implementation partner. "We did our due diligence and realized that Intellera had consistently been the most knowledgeable and responsive" she explained. "They understood our needs and were very easy to work with and very hands-on", she added.

Intellera worked hand in hand with the Advancement team at McGill University to review their current processes, identify improvements and define key metrics, and as a result, they were able to facilitate and accelerate the implementation of the system. They know digital transformation is tough and pride themselves on becoming a trusted ally during the journey.



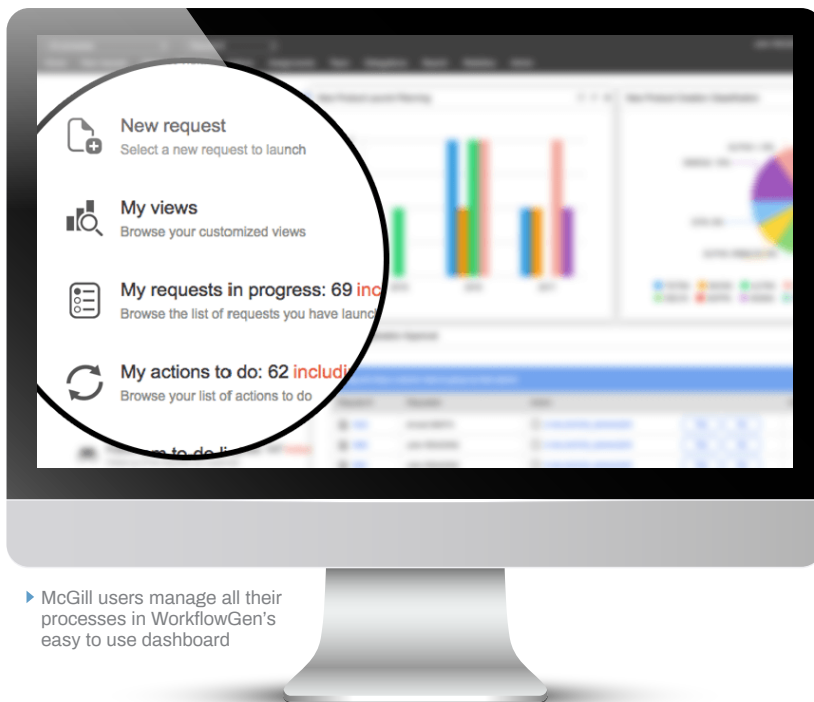
The results

The Advancement Office is very happy with the results of this project. The solicitation approval process was the first to go live and it received rave reviews. “Our Donor Officers are thrilled with the new workflows. They are the primary users and don’t like having to spend a lot of time on the computer, but they were very open to the interface. Intellera and WorkflowGen made the process really user-friendly. With the new Planned Gift Request workflow, what used to take weeks now takes days,” Joanne reported. With the new automated workflows, the team has visibility into the whole process. A workflow sent from one group may have to go to many departments and each department may add comments, or information before they forward it to the next one, usually by email. The originating group would have no idea where the workflow was or what had been added. Now, if there is a bottleneck, they can spot it and deal with it immediately.”

WorkflowGen integrated so well with our CRM system. We don’t have to re-enter any information. You can put information into the CRM or pull it out – the information flows in either direction. Now, with the pandemic forcing many people to work from home, we are looking at automating many more additional workflows

Joanne Morris,

Portfolio Manager at McGill University’s Advancement Office



The team in the Advancement Office had only praise for Intellera. “They asked a lot of questions and their training was very effective. Whenever we were stuck with a problem or didn’t know how to do something I knew I could count on Intellera’s team. They responded to questions so quickly. If I had to use three words to describe them it would be: responsive, eager and knowledgeable. I absolutely recommend Intellera and WorkflowGen to other universities.”